Jane Smith JS
FINANCIAL PLANNING

Job Title:	**Client Services Administrator**
Purpose of Job	To support Financial Planners and ensure a smooth delivery of excellent client service and client communication, as per business processes.
Reports To:	Business Manager
Salary Range:	£20,000 - £28,000 depending on experience
Working Hours:	9-5pm Monday – Friday

Why choose Jane Smith Financial Planning

As a successful and award-winning chartered financial planning firm our ethos is to provide an independent financial planning service, building relationships that last a lifetime with both our clients and our staff. With a small but highly trained and qualified team, Jane Smith is looking for another individual that is enthusiastic, driven, extremely organised and thrives on a busy and challenging role keeping the best possible service and company standards.

We understand the right balance is needed when it comes to work and personal life so we do all we can to encourage a good work-life balance, currently working on a 60/40% split of office and home working, with potential for early Friday finishes, along with a competitive salary and beneficial perks as detailed below ensures we support each other.

Benefits

- 25 days holiday (plus bank holidays)
- 3% employer pension contribution
- Health Cash back Scheme enrolment
- Training allowance / support towards qualifications
- Potential for bonus up to 10% of salary
- Potential for Hybrid working
- Potential for Friday early finishes

The role of the Client Services Administrator is to deliver excellent customer service to your own batch of clients and provide administrative support to the Paraplanners and Financial Planner. Experience within the Financial Planning industry is desired but not essential if you have an extensive administration background. To follow is a list of the key responsibilities and the skills needed to make this role a success.

Key Responsibilities & Accountabilities

Client servicing

- Provide a friendly and professional point of contact for clients and enquiries (by phone, email and in person)
- Organise existing and prospective client meetings and actively manage FP's diary and workload
- Prepare client documentation in advance of and following client meetings (as per business processes)
- Manage client service needs and client expectations to ensure client satisfaction

- Liaise with other team members on work progress per client account and keep clients in formed (as per business process)
- Liaise with clients on any administration queries they may have
- Assist in client meetings when required
- Ensure that relevant service components (as per client agreement) are delivered throughout the year in a timely manner
- Open and maintain client files to the required compliance standards
- Ensure action points resulting from client meetings get diarised and dealt with

Client administration

- Check accuracy and completeness of new business documentation
- Ensure that all business applications are processed accurately and efficiently, in a compliant manner to the firm's standards
- Ensure all supporting documentation is maintained as per company procedures
- Liaise with product providers to ensure timely and accurate responses to clients (progress chasing)
- Send Letters of Authority and gather accurate information as per business process
- Obtain illustrations and application forms
- Produce portfolio valuations
- Ensure fund top ups, withdrawals, switches, and rebalances are carried out accurately and within company timescales

Reviews

- Organise client review meetings as per Annual Review Process
- Prepare paperwork required for the reviews as per Annual Review Process
- Support FPs in the delivery of reviews, if needed
- Ensure implementation of agreed actions

General administration

- Ensure back-office systems are kept up to date
- Filter FP's general information, queries, phone calls and invitations
- Open, scan, log and allocate incoming post when needed
- Other duties as directed by management

Person Specification

CRITERIA	**E OR D**

D = Desirable E = Essential

KNOWLEDGE

Microsoft Word, Excel, and electronic diary management	**E**
Prestwood back-office systems	**D**
Advanced Excel	**D**

Knowledge of Financial Services Products	**E**
Knowledge of cash flow planning tools	**D**

SKILLS

Interpersonal skills to develop and maintain client trust and inspire confidence	
	E
Excellent communicator (both verbal and written)	**E**
Highly organised, methodical, and disciplined	E
Shows initiative and takes personal responsibility for completing tasks	**E**
Able to work within defined business processes	E
Adopts a positive attitude, willing to assist others when busy	**E**
Able to work under pressure on occasions to achieve deadline	**E**
Attention to detail	**E**
E	
Ability to achieve agreed outcomes without supervision	**E**
Excellent ability to prioritise and plan workload	**E**
Evidence of correspondence raising and diary management	**E**

EXPERIENCE

At least 2 years' experience working as an administrator	**E**
Previous PA experience from within financial services industry	**D**
At least 2 years working within a financial planning environment	**E**

QUALIFICATIONS

Certificate in Financial Planning or equivalent	**D**
R01	**E**
LP2	**E**